



City of Norman Resident Retail/Restaurant Survey

Executive Summary

July 31, 2014

Synopsis

Retail and restaurant opportunities are important elements of any thriving city and contribute to and enhance the quality of life in that area. Availability of these opportunities can provide a unique and enjoyable experience for both a city's residents and visitors. Retail and restaurant expenditures in the form of sales tax collections are a critical component of the City of Norman's General Fund Budget, accounting for almost 60% of the General Fund Budget total for FYE 2014.

On April 10, 2014, the City published a link to an online retail and restaurant survey on its homepage and social media outlets that was designed to gather feedback from residents about retail shopping and restaurant opportunities that they would like to see locate and/or expand in Norman. The survey also asked respondents for voluntary information on their shopping preferences, spending patterns and other basic demographic information. The survey was designed to provide additional insight into specific citizen dining and shopping preferences and patterns. The information collected from the survey will be used in conjunction with the data from the Retail Market Analysis (completed in July 2014) to help develop future City retail recruitment strategies.

Survey Details

The 12-question survey was made available to the public on April 10, 2014, and data was collected until July 30, 2014. Five hundred and forty-four (544) individual surveys were submitted online. In addition to seeking input on retail and restaurant opportunities, survey respondents contributed demographic and shopping preference information. This survey was not intended to be scientific nature, but rather, a general survey to gather input. Respondent information and answers were kept completely confidential.

Survey Highlights

Top 15 Requested Retail Stores Not Currently Located in Norman:

1. IKEA
2. Trader Joe's
3. Nordstrom/Nordstrom Rack
4. Macy's
5. Costco
6. Whole Foods
7. H&M
8. Apple
9. Crate and Barrel
10. Pottery Barn/Pottery Barn Kids
11. Anthropology
12. Urban Outfitters
13. J Crew
14. Banana Republic
15. Cabela's

Top 15 Requested Restaurants Not Currently Located in Norman:

1. In-N-Out Burger
2. Dairy Queen
3. The Cheesecake Factory
4. P.F. Chang's
5. Pappadeaux Seafood Kitchen
6. Steak 'n Shake
7. TGI Fridays
8. Texas Roadhouse
9. Dunkin' Donuts
10. Macaroni Grill
11. Big Truck Tacos

12. Mimi's Café
13. Fuddruckers
14. Dave & Busters
15. La Madeleine

Top 5 Requested Retail/Restaurants For Expansion Currently Located in Norman:

1. Starbucks
2. Target
3. Chick-fil-A
4. Taco Bueno
5. Arby's

There were also a significant number of survey responses requesting the City foster the growth and expansion of local, small and independent businesses that are currently located in Norman and/or entrepreneurial in nature. Many of these responses were expressed in the comments section and throughout many of the survey questions.

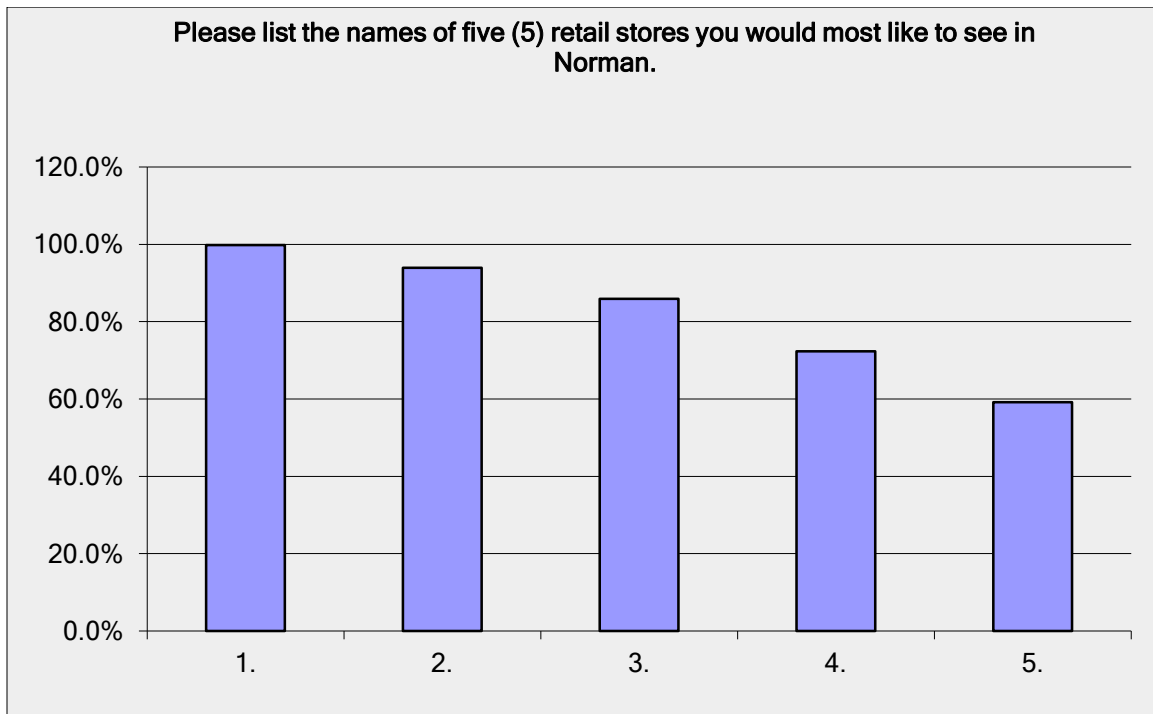
Summarized Survey Results

The following information is a summarized version of survey responses and results with general information related to survey responses. In addition to the specific questions related to retail and restaurant preferences, this survey also provided a "Comments" section to allow survey respondents to give additional insight, thoughts and opinions on retail and restaurant opportunities in Norman. Due to the number and broad spectrum of comments (over 212 separate responses), this section of the survey, along with copy of the survey and its raw data can be provided separately upon request.

Shopping/Dining Preferences

Please List the Names of Five (5) Retail Stores You Would Most Like to See in Norman

Response Statistics:



Top 15 Requested Retail Stores:

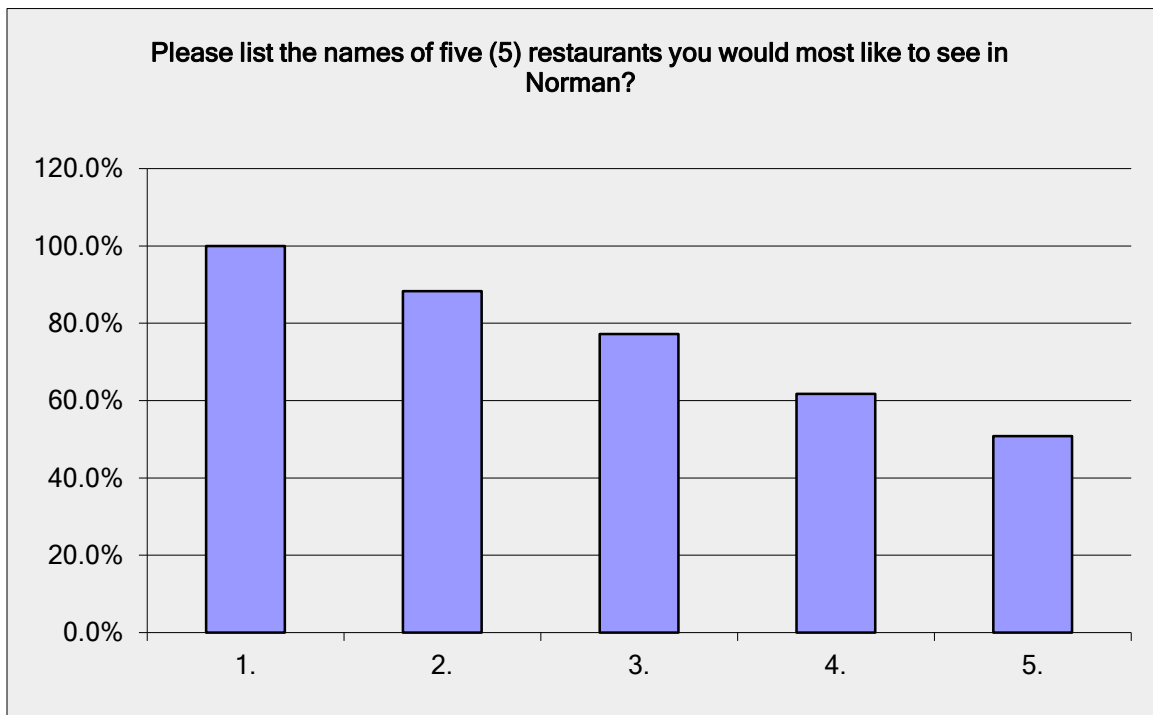
1. IKEA
2. Trader Joe's
3. Nordstrom/Nordstrom Rack
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5. Costco
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There were also a number of comments expressing interest in cultivating local, independent and small businesses in Norman.

Please List the Names of Five (5) Restaurants You Would Most Like to See in Norman.

Response Statistics:



Top 15 Requested Restaurants:

1. In-N-Out Burger
2. Dairy Queen
3. The Cheesecake Factory
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There were also a number of comments expressing interest in cultivating local, independent and small businesses in Norman.

Which Retail Businesses and/or Restaurants Currently Located in Norman Would You Like to See Expand Closer to Your Area?

Response Statistics:



Top 5 Requested Retail/Restaurants:

1. Starbucks
2. Target
3. Chick-fil-A
4. Taco Bueno
5. Arby's

There were also a number of comments expressing interest in cultivating local, independent and small businesses in Norman.

Where do you primarily shop when you leave Norman?

Response Statistics:

Frequently Answered Cities:

- Oklahoma City, OK
- Moore, OK
- Dallas, TX/DFW Metro

Other Regional Cities Listed:

- Noble, Ok
- Purcell, Ok
- Tulsa, OK
- Edmond, OK
- Midwest City, Ok
- Shawnee, OK

Frequent Stores/Locations Listed:

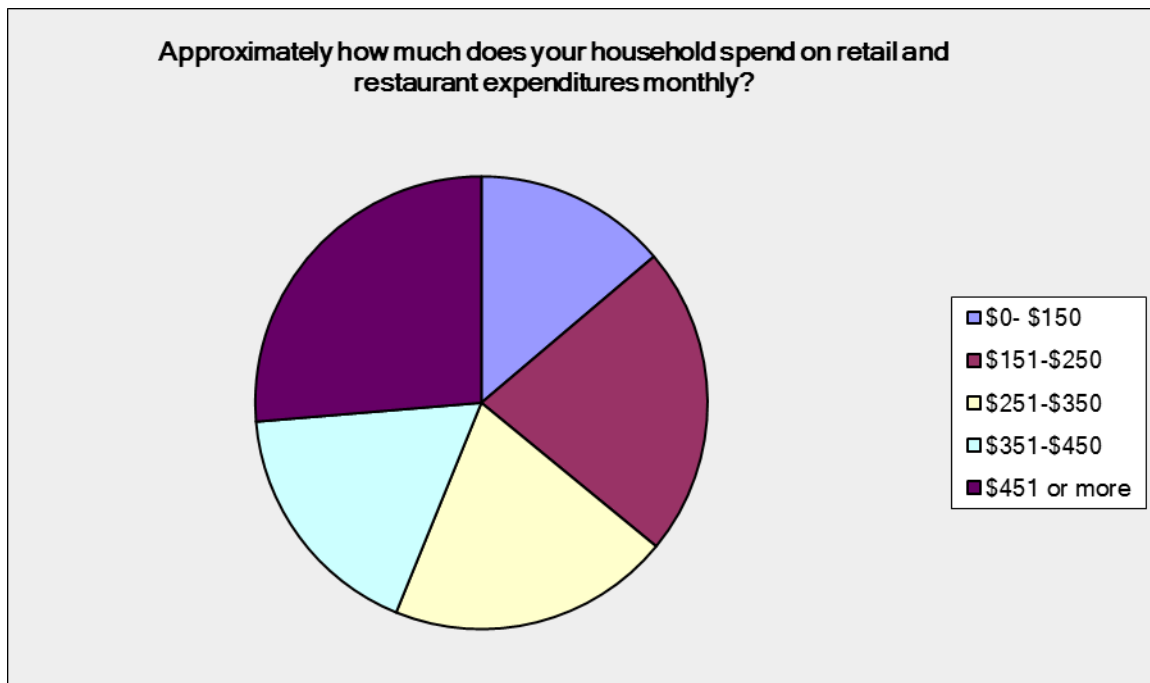
Oklahoma City: Apple Store, Penn Square Mall, Macy's, Outlet Factory Shoppes

Dallas/DFW Metro: Fry's Electronics, IKEA, World Market, Williams –Sonoma, Container Store

Moore: Dick's Sporting Goods, 19th St. Area, 149th St. Area, Gordman's, Warren Theater, Catherine's, Kohl's, JC Penney

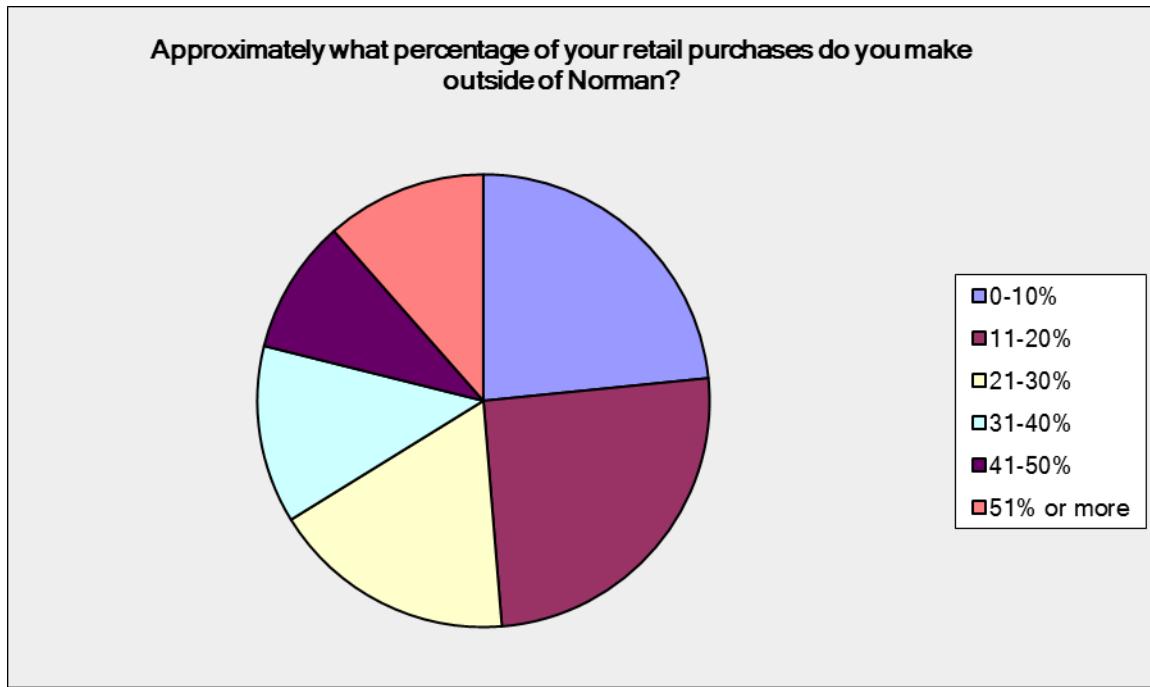
Approximately how much does your household spend on retail and restaurant expenditures monthly?

Answer Options	Response Percent	Response Count
\$0- \$150	13.8%	72
\$151-\$250	22.1%	115
\$251-\$350	20.2%	105
\$351-\$450	17.5%	91
\$451 or more	26.3%	137
<i>answered question</i>		520
<i>skipped question</i>		24



Approximately what percentage of your retail purchases do you make outside of Norman?

Answer Options	Response Percent	Response Count
0-10%	23.4%	122
11-20%	25.3%	132
21-30%	17.5%	91
31-40%	12.7%	66
41-50%	9.6%	50
51% or more	11.5%	60
<i>answered question</i>		521
<i>skipped question</i>		24



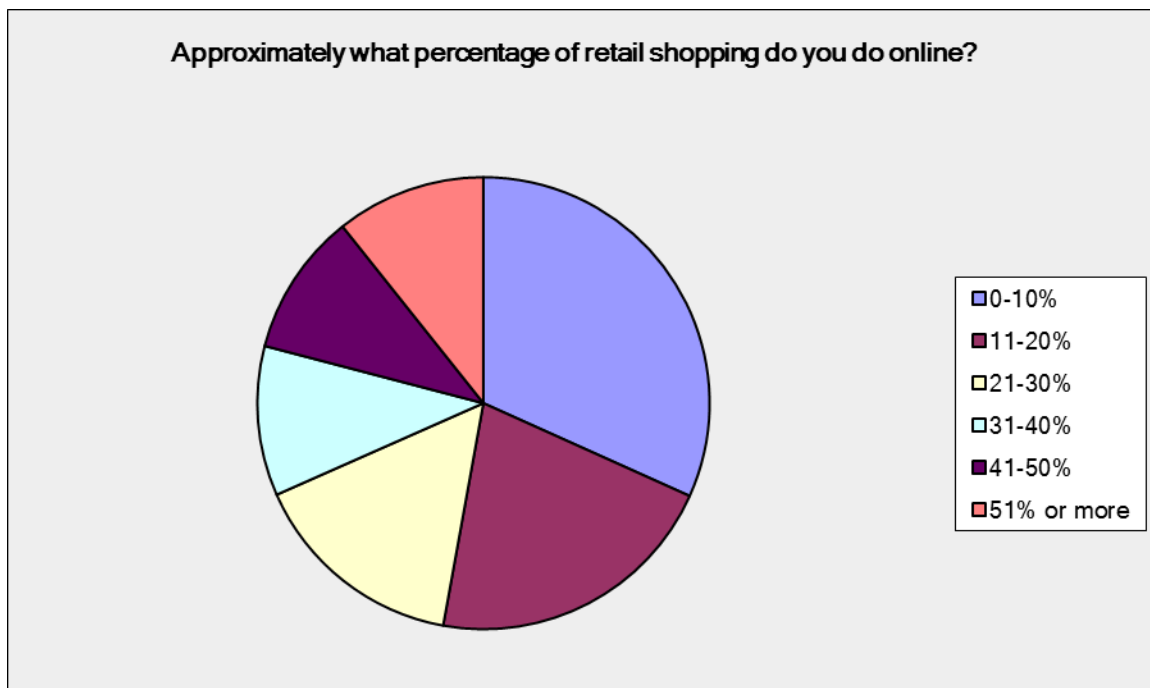
When you shop outside of Norman, what do you buy?

Answer Options	Response Percent	Response Count
Clothing	77.7%	391
Electronics/Computers	20.9%	105
Grocery Items	27.8%	140
Home Furnishings	61.4%	309
Meals/Entertainment	65.6%	330
Sporting Goods	19.3%	97
Appliances	14.5%	73
Other (please specify)		39
answered question		503
skipped question		42



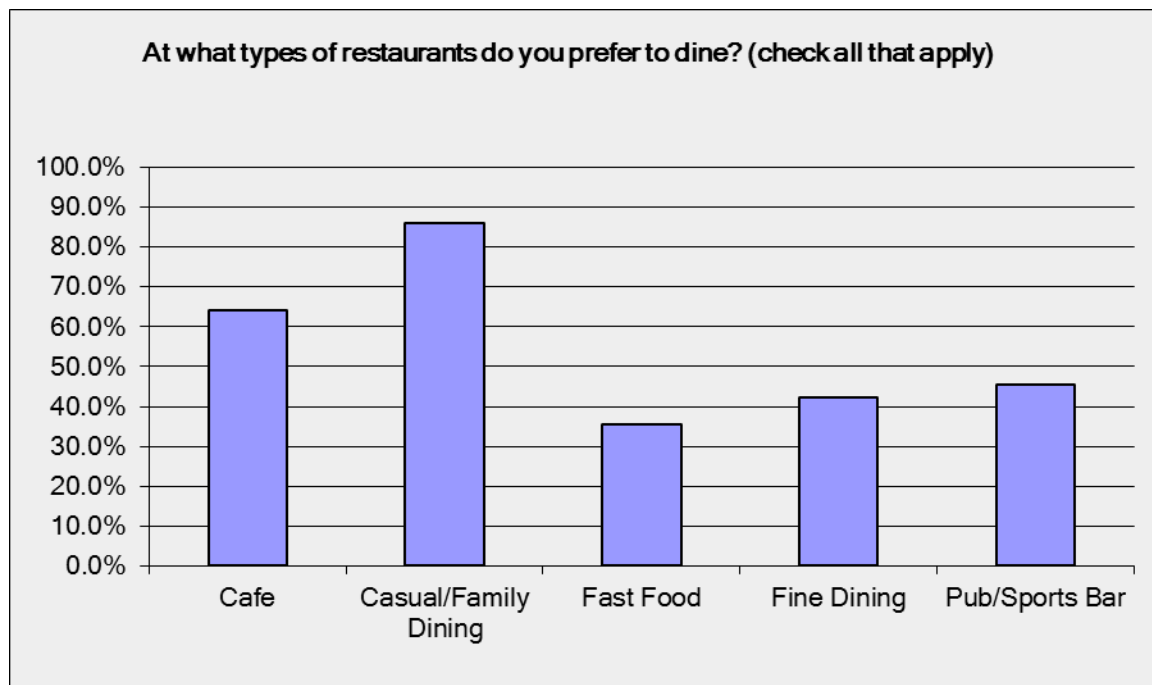
Approximately what percentage of retail shopping do you do online?

Answer Options	Response Percent	Response Count
0-10%	31.7%	165
11-20%	21.1%	110
21-30%	15.5%	81
31-40%	10.7%	56
41-50%	10.2%	53
51% or more	10.7%	56
<i>answered question</i>		521
<i>skipped question</i>		24



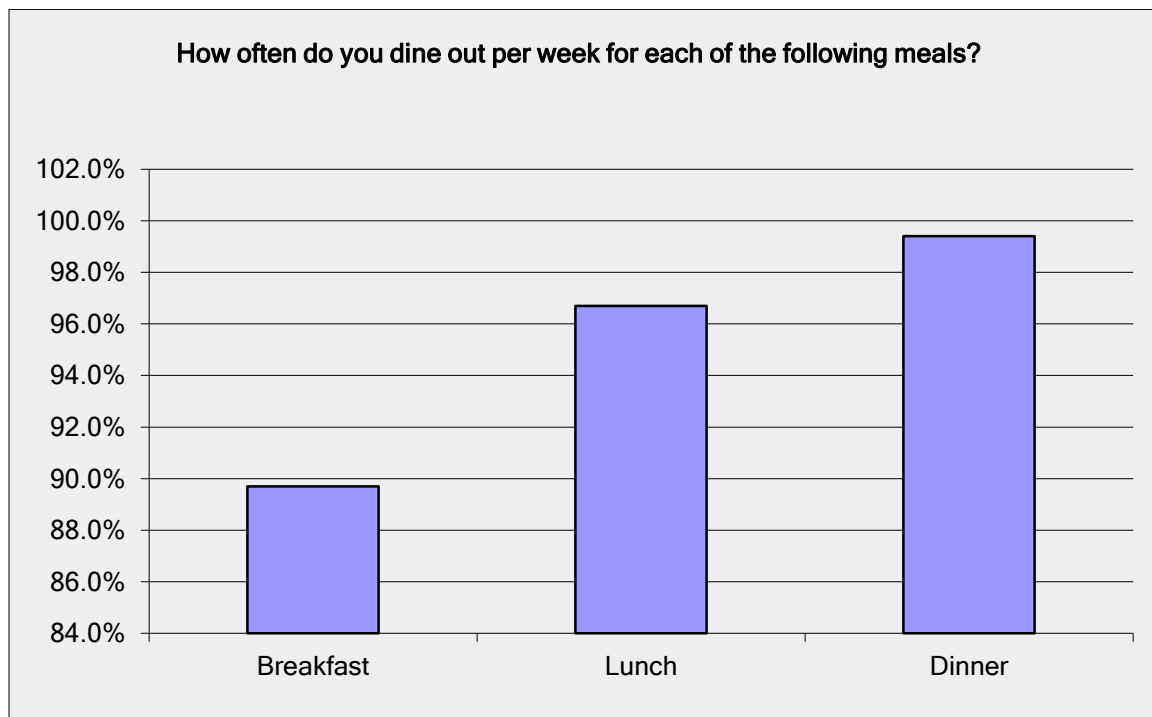
At what types of restaurants do you prefer to dine?

Answer Options	Response Percent	Response Count
Cafe	64.2%	337
Casual/Family Dining	85.9%	451
Fast Food	35.6%	187
Fine Dining	42.3%	222
Pub/Sports Bar	45.5%	239
Other (please specify)		63
answered question		525
skipped question		19



How often do you dine out per week for each of the following meals?

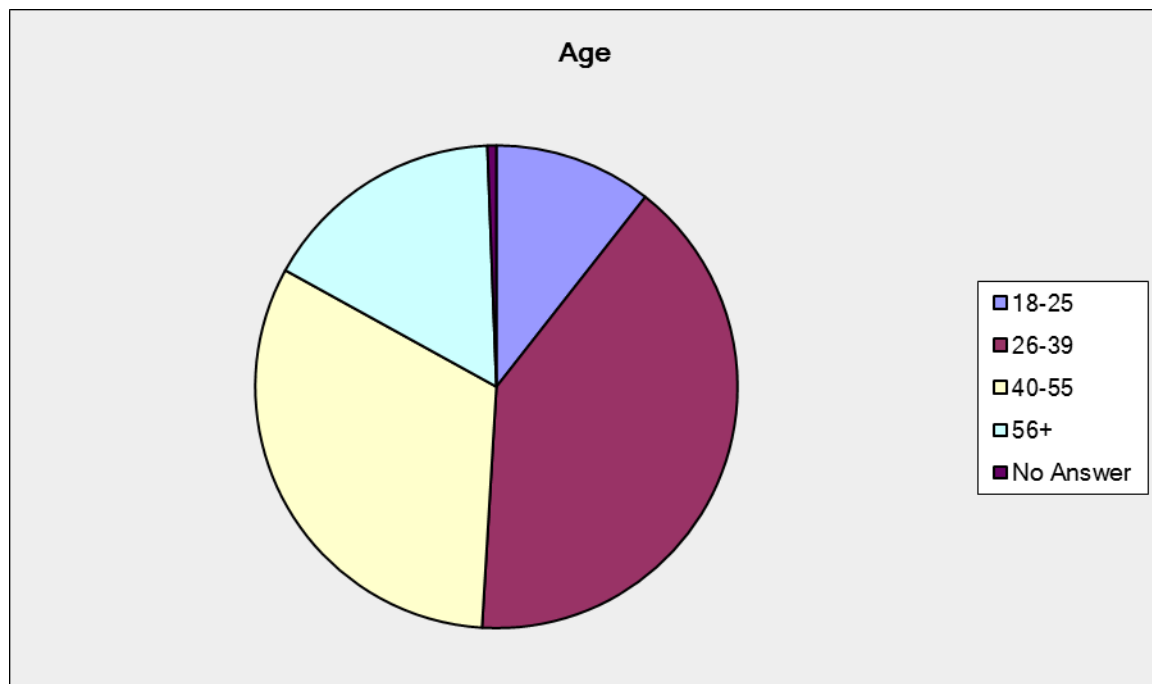
Answer Options	Response Percent	Response Count
Breakfast	89.7%	469
Lunch	96.7%	506
Dinner	99.4%	520
<i>answered question</i>		523
<i>skipped question</i>		21



Demographic Information

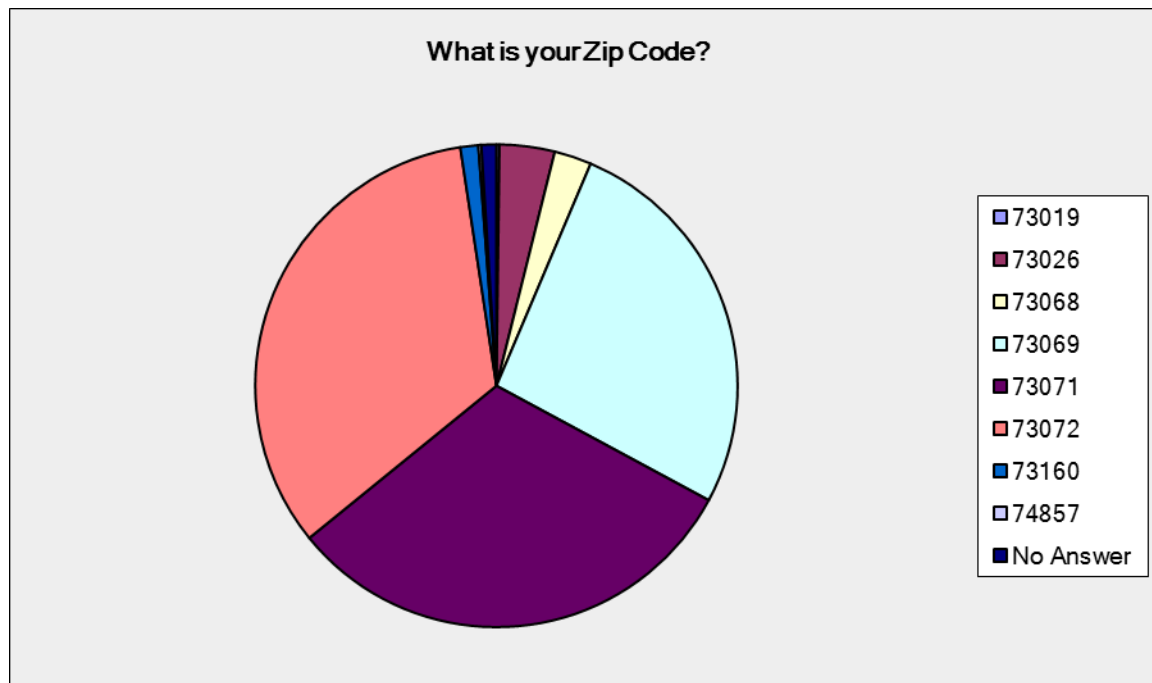
Age

Answer Options	Response Percent	Response Count
18-25	10.6%	56
26-39	40.4%	214
40-55	32.1%	170
56+	16.4%	87
No Answer	0.6%	3
<i>answered question</i>		530
<i>skipped question</i>		14



Zip Code

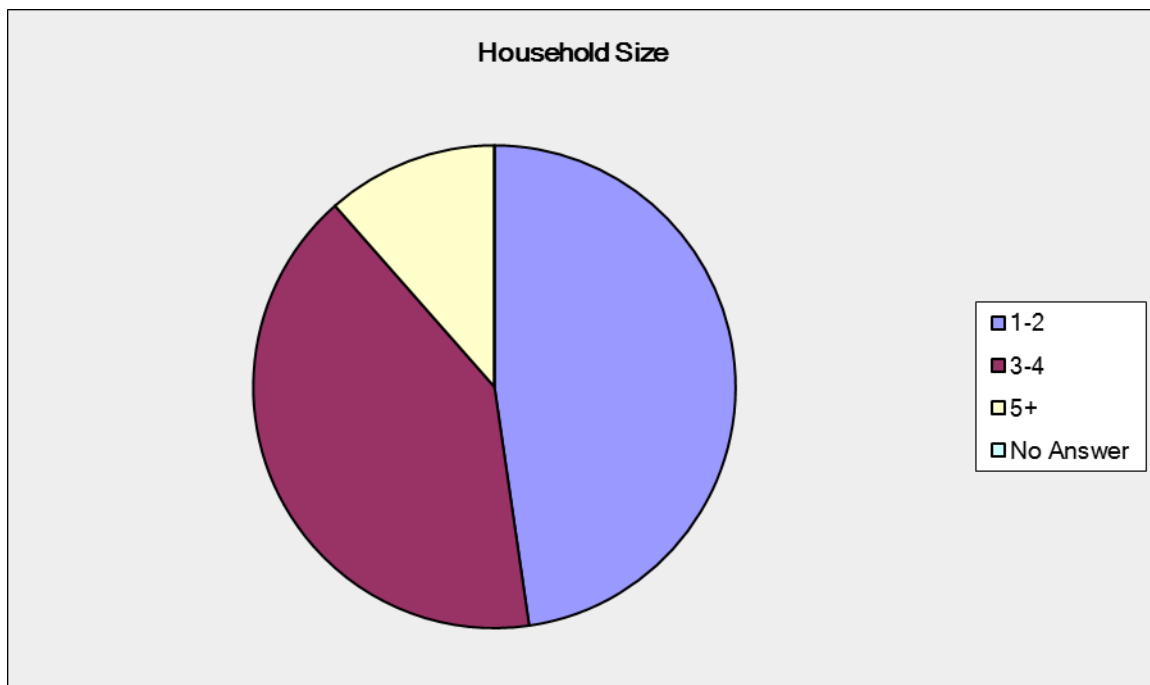
Answer Options	Response Percent	Response Count
73019	0.2%	1
73026	3.7%	19
73068	2.5%	13
73069	26.5%	138
73071	31.3%	163
73072	33.5%	174
73160	1.2%	6
74857	0.2%	1
No Answer	1.0%	5
Other (please specify)		13
<i>answered question</i>		520
<i>skipped question</i>		25



*** Zip Code Map Attached on Final Page of Executive Summary***

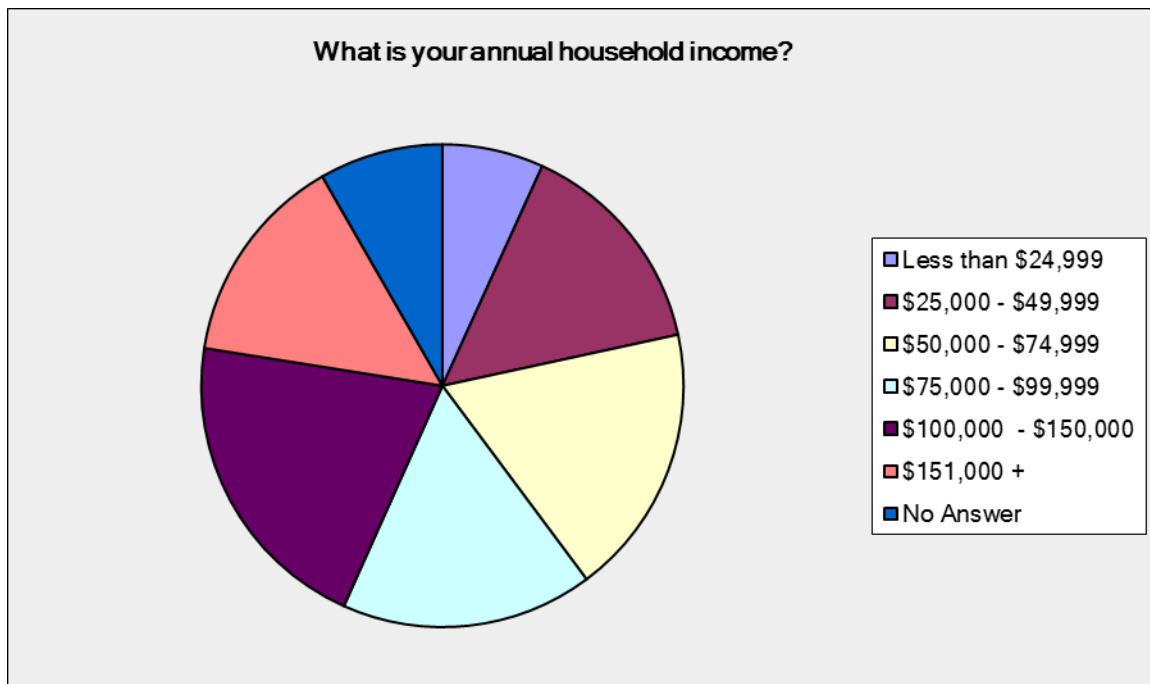
Household Size

Answer Options	Response Percent	Response Count
1-2	47.7%	254
3-4	40.8%	217
5+	11.5%	61
No Answer	0.0%	0
<i>answered question</i>		532
<i>skipped question</i>		12



Annual Household Income

Answer Options	Response Percent	Response Count
Less than \$24,999	6.8%	36
\$25,000 - \$49,999	14.8%	78
\$50,000 - \$74,999	18.2%	96
\$75,000 - \$99,999	16.9%	89
\$100,000 - \$150,000	20.8%	110
\$151,000 +	14.2%	75
No Answer	8.3%	44
<i>answered question</i>		528
<i>skipped question</i>		16



The map displays the city of Norman, Oklahoma, and its surrounding areas. Key features include:

- Geography:** Lake Thunderbird State Park is located to the east of the city, and the David J. Perry Airport is to the south.
- Infrastructure:** Major highways shown include I-40, I-24, and US-77.
- Zip Codes:** The map is divided into several zip code areas: 73160 (orange), 73165 (pink), 73069 (purple), 73071 (light purple), 73072 (grey), and 73068 (dark pink).
- Landmarks:** The Jimmie Austin OU Golf Course is located south of the city center.
- Water Bodies:** Several lakes are visible, including Lake Stanley Draper and Lake Thunderbird.

The word "Norman" is written in large, bold letters across the center of the map.